


APPENDIX A
PROPOSAL AUTHENTICATION FORM

TITLE: Decision Support Tools and Predictive Analytics in Human Services

DUE DATE: APRIL 18, 2014

The undersigned hereby offers to furnish and deliver the services as specified in strict accordance with the RFP and scope of proposal, all of which are made a part of this request. This offer is not subject to withdrawal without permission of the County of Allegheny Department of Human Services Director.	
FULL LEGAL COMPANY NAME: <u>Eckerd Youth Alternatives, Inc.</u>	
DOING BUSINESS AS: <u>Eckerd</u>	
STREET ADDRESS: <u>100 North Starcrest Drive</u>	
CITY, STATE AND ZIP CODE: <u>Clearwater, Florida 33765</u>	
AUTHORIZED SIGNATURE: 	
PRINT NAME: <u>David Dennis</u>	
TITLE OF AUTHORIZED SIGNER: <u>President/CEO</u>	
TELEPHONE #: <u>(727) 461-2990</u>	FAX #: <u>(727) 442-5911</u>
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Chapter 2
COMPANY INFORMATION

(This information is for tracking purposes only and has no role in the determination of the responsible proposer.)

- ☐ Check here if your firm is registered with the Allegheny County Department of Minority, Women and Disadvantaged Business Enterprises
- ☐ Check here if your firm is a "Minority Business Enterprise" or "MBE" as defined in the Small Business Act, 15 USC
- ☐ Check here if your firm is a "Women Business Enterprise" or "WBE" as defined in the Small Business Act, 15 USC
- ☐ Check here if your firm is a "Small Business" as defined by the Small Business Administration (13 C.F.R. 121.201, in most cases, this means a business with 500 or fewer employees)

NOTE: THIS PAGE MUST BE SUBMITTED WITH YOUR PROPOSAL. ALL PAGES REQUIRES A LIVE SIGNATURE SIGNED IN BLUE INK.

APPENDIX B
ABBREVIATED APPLICATION

1. Primary Contacts

Name	Chief Executive	Chief Information Officer	Chief Financial Officer	Contract Processing Contact
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(727) 461-2990	(727) 461-2990	(727) 461-2990	(727) 461-2990	

Note: If you are an individual applying, you may identify yourself for all of the above roles.

2. I/we certify that this I/we/this organization is not currently under suspension or debarment by the Commonwealth of Pennsylvania, any other state, county or the federal government.

☒ So certified

3. Have you ever obtained or been denied a performance or fidelity bond, or has your bond ever been revoked?

☐ Yes ☒ No

If yes, explain:

4. Has an application to be an Allegheny County provider/vendor been denied in the past?

☐ Yes ☒ No

If yes, explain:

5. Have you ever filed for bankruptcy?

☐ Yes ☒ No

If yes, explain:

6. Have you paid all taxes for the past years, including but not limited to real estate tax, employer taxes, employee withheld taxes, personal income tax (if individual)?

☒ Yes ☐ No

If yes, explain: Eckerd pays all taxes in accordance with Federal, State and local requirements.

7. Do you have the capability to do electronic billing if required?

☒ Yes ☐ No

If yes, explain: Eckerd currently submits invoices and receives payment electronically with many vendors.

8. Do you currently carry the insurance (see contract on DHS website) required to enter into a contract with DHS?

☒ Yes ☐ No

If yes, explain: A copy of our Certificate of Insurance will be provided upon request.

9. Do you/your staff have valid Pennsylvania driver licenses?

☐ Yes ☒ No

If yes, explain:

As an authorized signatory for Eckerd Youth Alternatives, Inc. I hereby certify to the best of my knowledge and belief that the information in this proposal and application is true and accurate.

Signature:  Date: April 16, 2014

Print/Type Name: David Dennis Title: President/CEO

The first name in second chances.SM



Submitted by:

Eckerd
100 N. Starcrest Drive
Clearwater, FL 33765

Title of Reply:

Proposal to Design and Implement Decision Support Tools and Predictive Analytics in Human Services

Issuing Entity:

County of Allegheny, Department of Human Services

Issue Date:

2/26/2014

Vendor:

Eckerd Youth Alternatives, Inc.

DUNS #: 08-068-1158

FEIN: 59-2551416

Response

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Program

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Due Date:

Date: **April 18, 2014**



Eckerd.org

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2. Executive Summary

Eckerd is a national nonprofit, 501(c)(3) organization headquartered in Clearwater, Florida with a full continuum of behavioral health and child welfare programs. Eckerd's experience translating research into outcomes began in the early 1990s when Eckerd first partnered with Clemson University to establish methods for validating outcomes for its range of programs. Later, Eckerd partnered with Harvard University to evaluate early intervention and prevention outcomes. In January 2013, Eckerd used its experience in predictive analytics to identify child welfare cases of highest probability of a child homicide and identify interventions predicted to have the best chance of keeping each individual child safe. Known as Eckerd Rapid Safety Feedback, this predictive model of using data analysis and modeling for decision making has received national attention and has resulted in no abuse-related deaths since implementation, a 22 percent improvement in nine critical case practices, and the provision of real time case practice guidance to child welfare workers. Results from this coaching resulted in a 21 percent reduction in all in-home abuse incidents.

Eckerd operates the largest privatized child welfare system in the country; serving 6,000 children daily. Eckerd's system is larger than 14 states and the District of Columbia and its performance on CSFR composite outcomes ranks Eckerd's system of care ninth best in the nation. A key element of Eckerd's success is its ability to use data to drive performance through innovative data packets and data calls that ensure accountability for results. For the last six years, Eckerd has partnered with Mindshare for developing decision tools and predictive analytics. Mindshare brings expertise in data analysis and interoperability solutions; using patents pending heuristic algorithms that are customized for social services, education, juvenile justice, and child welfare systems. Through its partnership with Mindshare, Eckerd has established state-of-the-art predictive models that isolate child welfare cases that have a high probability for a variety of poor outcomes (e.g., reentering the child welfare system after a period of reunification).

The Eckerd Quality improvement team is led by Ron Zychowski, Eckerd Chief Performance and Quality Officer, who previously served as Chief Executive Officer for three Community-Based Care Lead Agencies and as a District Administrator, Budget Officer, and Regional Operations Director with Florida DCF. Bryan Lindert, Eckerd Director of Quality Management, managed an automated Service Referral Internet Portal from concept to launch and developed Eckerd Rapid Safety Feedback. The Mindshare team has over 20 years' of project experience that is relevant to Data Modeling, Data Mining, Data Analytics, Statistical Analytics and Predictive Analytics for large-scale integration projects. Led by Greg Povolny, formerly Senior Architect at IBM and currently CEO of Mindshare Technology, Greg has been granted nearly a dozen patents for unique data processing and data deconstruction and reconstruction algorithms.

Eckerd is requesting \$720,530 to provide DHS decision support tools and predictive analytics targeting five critical indicators: 1. Probability of future harm for child abuse cases; 2. Probability of placements disruption; 3. Probability of reunifications that will disrupt/fail; 4. Probability of child welfare clients that will cross over (to JJ); and 5. Probability of a child not achieving timely permanency. This will be achieved using a five-phase system development life cycle which includes Requirements Analysis & Validation, Design, Implementation, Testing, and Deployment & Sustainability. Outputs from this work will be used to improve performance at the individual case level for use by front line staff and at a system-level for management by administrators. In addition to the direct involvement of the data and systems experts from Eckerd and Mindshare identified above, a full-time Business Analyst and Project Director will be on-site in Allegheny County to work closely with DHS leadership throughout the term of the project.

3. PROGRAM NARRATIVE

A. ORGANIZATIONAL DESCRIPTION (30 POINTS)

1. Eckerd History and Experience

Since its founding in 1968, Eckerd, a nonprofit, 501(c)(3) organization headquartered in Clearwater, Florida has expanded its continuum of behavioral health and child welfare programs while exploring research-based best practices to improve service delivery. In the 1990s, Eckerd prioritized its research, evaluation, and prediction efforts by partnering with research departments in Universities to help design and evaluate program outcomes and to validate that program approaches were supported by logic models and evidence-based frameworks. Eckerd first worked with Clemson University to establish methods for validating outcomes for its range of residential treatment and aftercare programs. Later, Eckerd partnered with Harvard University to evaluate early intervention and prevention services. Eckerd has also partnered with the Louis de la Parte Florida Mental Health Institute of the University of South Florida in responding to a variety of research-based grants and contracts. Most recently, Eckerd has partnered with Mindshare to develop data-driven decision tools and predictive analytics for its large-scale child welfare lead agency contracts.

Three projects that illustrate Eckerd's capacity to build on research and to develop and implement predictive models include Eckerd Rapid Safety Feedback (RSF), use of predictive analytics to measure key performance indicators of child welfare systems in Florida, and domain development for the North Carolina Family Assessment Scale. These projects are outlined in greater detail in the following sections.

a) Eckerd Rapid Safety Feedback (RSF)

Eckerd was selected to manage the child welfare system in Hillsborough County, Florida in June 2012, after a series of over nine child homicides had occurred. Eckerd and the local Department of Children and Families (DCF) agreed that a new approach to quality assurance in child welfare was critical to prevent additional child injuries and fatalities from occurring. Prior to assuming case responsibility in Hillsborough County, Eckerd organized, funded, and completed a multidisciplinary Quality and Safety Improvement review of all open cases in the County. Over 1,500 cases were included in the analysis. The purpose of this review was to ensure that children were safe while providing Eckerd with valuable information on system gaps and roadblocks that were adversely impacting achieving timely permanency for, and ensuring the well-being of children.

[REDACTED]

[REDACTED]

[REDACTED]

[REDACTED]

[REDACTED]

[REDACTED]

[REDACTED]

[REDACTED]

b) Lead Child Welfare Agency Performance Indicators

As a system operator for a child welfare system that serves more than 6,000 children and youth annually, Eckerd has significant experience with both state and nationally required child welfare outcomes. Moreover, its experience includes the turnaround of two underperforming systems inherited from prior providers who had failed to meet community expectations. Eckerd accomplishes this through data transparency and forecasting. At a system level, transparency and forecasting are accomplished through its published weekly data packets available to the public at:

<http://www.eckerdcbc-c6.org/keep-informed/weekly-data-report/> and

<http://www.eckerdcbc-c13.org/keep-informed/weekly-data-reports/>

[REDACTED]

[REDACTED]

Eckerd created the reports and dashboards out of a critical need. In September of 2012, Eckerd had experienced an unprecedented increase in the number of children the local sheriff's office had removed in *both* Circuit 6 counties (Pinellas and Pasco). This trend occurred despite the fact that hotline calls were actually reduced. Moreover, even though Eckerd had exited more children than expected, there was still an increase in out-of-home care of more than 350 children who would need to exit care one year later.

[REDACTED]

[REDACTED]

Like Eckerd Rapid Safety Feedback, entry cohort forecasting represents a use of technology that, when combined with operational expertise, not only reversed poor outcomes, but also led to top system performance. Today, this Circuit is the best performer on the DCF scorecard for timely permanency.

c) NCFAS Collaboration

Eckerd is currently working as a research partner with Dr. Ray Kirk and the National Family Prevention Network in Iowa to develop and implement new domains of the North Carolina Family Assessment Scale (NCFAS) relating to trauma and enhanced well-being. As part of this partnership, Eckerd is assisting with the testing of the new domains at its various operational locations and collecting data to be used to validate the new domains and to verify the sensitivity and predictive ability of the NCFAS relating to client outcomes.

This project is another example of Eckerd's ability to develop and validate tools using a research-based approach and to collaborate effectively with partners in large-scale data dependent projects.

2. Mindshare History and Experience

The Mindshare team has over 20 years' of project experience that is relevant to Data Modeling, Data Mining, Data Analytics, Statistical Analytics, and Predictive Analytics for large-scale integration projects. Core competencies include, but are not limited to, Machine Learning subject matter expertise, Decision Tree implementation, and a deep understanding on how to tune the performance of a predictive model across test and training data sets.

The Mindshare team is equipped with strategies, techniques, and tools that will be applied to decision support requirements for Allegheny's Department of Human Services. Mindshare has been implementing decision support solutions since 2002 where the focus has been on internal processes and systems for meeting customer needs. Mindshare brings data mining and predictive analytics specific competencies that provide strategic advantage for improving outcomes for children, families and adults in all areas of Human Services. Together with Care Management Organizations, Mindshare has applied predictive analytics to Child Welfare information sources in order to isolate cases that have high probability of failure. Mindshare has since applied the same approach to higher education data sources from universities to isolate areas of risk regarding student retention.

Projects led by Mindshare have not been limited to its software and services, but also have included architectural leadership for design and implementation of large scale systems. These projects have included integration with large scale back-end systems, web services implementation and mobile access.

Services provided have included the following:

- Architecture
- Programming / Engineering Services
- Relationship Management across vendors and client
- Project Management
- Adherence and enforcement of CMMI Level 2/3 (software engineering process)
- Managed Services
- Software Services
- Technical Support / help desk services

Skill sets and competencies include:

- Machine Learning
- Predictive Analytics
- Random Forest / Random Tree
- C4.5
- Multilayer Perceptron and other neural network modeling
- Standard Linear Regression
- Logistic Regression
- Business Intelligence
- Program management
- Project management (PMP, CAPM certified staff)
- System Architecture (IBM Certified Solution Designers)
- Database Architecture (database associates, advanced database administrators, senior database architects)
- System Integration
- WebServices, Messaging, Native network protocols
- Managed Services
- Data Center Operations
- WiFi Communications
- Satellite Communications

- Business Analysis
- Product management
- R&D
- Voice Capture
- Text To Speech (TTS)
- Speech to Text
- DTMF

Many agencies are not well versed in data management, nor do they have the infrastructure to support the required processing. Even so, they are forced to deal with limitations such as timeliness and accuracy of information and instant access to areas of risk that include compliance and out of compliance situations as it relates to State and federal guidelines. While a SACWIS system may be in place or not, it is of utmost importance to recognize the criticality to access and visualize the meaning of the information that is within the agency's system. Through its work with Eckerd, Mindshare staff has come to understand the requirements of the underlying database, and most importantly, the daily needs, and requirements from the field staff and how it all relates to their respective caseload.

Mindshare's staff has over 20 years' experience that is relevant to the requirements of this RFP with more than 9 years of applied data analysis and predictive analytics in Health and Human Services. Mindshare's implementation has been audited for the highest standards of security and process controls (the Sas70 Audit can be provided upon request). Further it adheres to the strictest measures of SACWIS, FERPA, and HIPAA compliance.

3. Experience with Human Services Practitioners

Eckerd has been a human services practitioner since 1968. Eckerd has employed a range of clinical, case management, and social work staff throughout its various program models and understands the specific needs of direct care providers in planning, delivering, and evaluating case practice. This subject matter expertise positions Eckerd well as a partner for the type of project scoped by Allegheny County. This practitioner-focused subject matter expertise culled from 46 years of human services delivery informs Eckerd's process for developing and deploying data-driven decision-making tools. The organization understands that practitioners need readily actionable and user-friendly systems and dashboards that provide critical insight into case progress and designs all systems and tools with an understanding of who will ultimately use the tool.

As detailed earlier, the development of Eckerd Rapid Safety Feedback is a primary example of leveraging practitioner expertise, systems development expertise, and data expertise to design a data-driven model that can improve client outcomes for an entire system, while also being able to drill down to provide value to the individual case worker who needs to monitor his or her individual cases for indicators most predictive of the potential for client harm. The real-time analytics are an invaluable tool for human services practitioners and the leaders of organizations in order to isolate cases of highest risk and make case planning and management adjustments to address the risk.

As with the Eckerd Rapid Safety Feedback approach, the NCFAS domain development project in Iowa, and lead child welfare agency performance standards detailed earlier in this response, Eckerd has demonstrated an ability to work with Department and Organizational Leadership to determine overarching goals for the use of data and to create data-driven solutions that drill down to the individual practitioner.

As a system operator, Eckerd has learned that forward-looking, child-level data are essential for detecting and correcting system performance declines early.

[REDACTED]. Using this process, Eckerd manages to its funder's expectations. Eckerd is currently ranked number 2 and 3 in performance out of 20 agencies on Florida's Child Welfare Scorecard (scorecard results are available by request).

Similarly, Mindshare's experience with practitioners, analysts, clinical staff and leadership is well documented. Mindshare has become intimate with the internal business process and technical underpinnings of Florida's Community Based Care agencies. Since 2005, Mindshare has deployed its software in public and virtual school systems to protect and improve the well-being of children. By analyzing feeds from multiple, autonomous systems and databases, Mindshare's solutions expand the reach and range of instant awareness by proactively pushing critical changes in student behavior to counselors and parents to ensure maximum accountability.

For example, in 2005, at the request of Florida's District 10 Senator, Mindshare embarked on a research project to analyze the available data within Florida's SACWIS system, with the requirement to work around its then current limitations. As a result, Mindshare has implemented a successful technology solution for collecting relevant data, isolating key attributes, identifying irregularities, and producing high impact dashboards that have been proven to positively impact outcomes and improve accountability at all levels. Mindshare's solution has since been deployed across the State of Florida and is in use by more than 60% of its lead community based care organizations.

The collaborative experiences of both Eckerd and its partner organization, Mindshare, are summarized in greater detail in the next section.

4. Collaborative Partnerships

a) Eckerd Collaborative Partnerships

Eckerd Rapid Safety Feedback: Eckerd Rapid Safety Feedback, first introduced in Section 3A, Subsection 1-(a), is an example of powerful collaboration between Eckerd, the Florida Department of Children and Families, and Mindshare. The analysis of over 1,500 child welfare cases in Hillsborough County, Florida resulted in key data trends that have been used to predict higher incidents of child harm.

[REDACTED]

[REDACTED]

- [REDACTED]

Initial Results:

- No abuse related deaths since implementation of Eckerd RSF.
- Quality Assurance staff are now directly changing case practice in real time.
- 21% reduction in ALL in-home abuse cases

Eckerd Rapid Safety Feedback has been successfully replicated in the other counties where Eckerd is the Community Based Care Lead Agency. In addition, the State of Florida Department of Children and Families has implemented a statewide rollout of the system in response to a statewide increase of child tragedies.

Eckerd Rapid Safety Feedback has been identified as a national best practice by Casey Family Programs. Eckerd has made presentations at multiple state and national meetings at the request of Casey Family Programs, the Alliance for Children and Families and the Child Welfare League of America about this approach. Eckerd is now working with these national partners as well as specific local and state entities to replicate the system. Eckerd Rapid Safety Feedback has also been featured by a variety of newspaper articles (articles available upon request) and the model has been presented at a variety of policy forums, conferences, and information-sharing site visits including:

- Denver Child Safety Forum; Improving Safety and Preventive Child Fatalities: Reframing Public Perception Casey Family Programs October 2013.
- Urban Child Welfare League, October 2013.
- CWLA Webinar: Challenges to Implementing a Public Health Approach for Improving Safety and Reducing Serious and Fatal Child Maltreatment, November 2013
- Casey Family Programs sponsored site visit with the Michigan Department of Human Services, January 2014
- Los Angeles Blue Ribbon Panel for Child Protection, March 2014.
- Florida Coalition for Children State Conference, January 2014.
- The Federal Commission to Eliminate Child Abuse and Neglect Fatalities (scheduled), July 2014.

Project Bridge: In 2013, Eckerd partnered with Paxen Learning Corporation, Henkels & McCoy, and Home Builders Institute to reengineer Florida's aftercare program for delinquent youth in response to a request for design solutions by the Florida Department of Juvenile Justice. The partnership represents an innovative, evidence-based model that prioritizes comprehensive assessment and vocational training and certification to decrease the recidivism potential of post-incarcerated youth. The program has been operational for less than a year but early analytics suggest that the program is having the desired impact on youth outcomes.

This initiative represents one of several collaborations with the Department of Juvenile Justice. Eckerd first partnered on an aftercare initiative in 1985 by becoming the first private provider of aftercare services in the State of Florida. Over the next 29 years, Eckerd worked with the Florida Department of Juvenile Justice to design and pilot an aftercare team model in Marion County, Florida, and later, a conditional release model that expanded throughout the state in the early 2000s.

Lead Child Welfare Contracts: As referenced throughout this response, Eckerd's role as a managing organization for child welfare in the State of Florida positions it well to understand both the child welfare arena and decision making tools and analytics required to manage its performance and the performance of its varied subcontractors. In partnership with the Florida Department of Children and Families, Eckerd has proven to be on the leading edge of innovative quality assurance, data mining, and predictive analytics to improve system practice by emphasizing individual case-level performance.

To monitor child welfare contract performance, Florida DCF maintains a Community-Based Care Lead Agency Scorecard that documents performance across the 20 child welfare entities. Based on the most recent Florida DCF scorecard, Eckerd's two lead agency programs, Circuit 13 (Hillsborough County, Florida) and Circuit 6 (Pasco and Pinellas Counties, Florida) are ranked second and third, respectively. Eckerd's Circuit 13 is ranked first in the State on Measure 3 (No verified maltreatment within six months termination of in-home and out-of-home services). For a copy of the February 2014 Community-Based Care Lead Agency Scorecard, please access this link:

<https://www.dropbox.com/s/ssw6b1f4iiksc83/CBC%20Revised%20Scorecard-February%202014%20Released%202014-03-24.xlsx>

b) Mindshare Collaborative Partnerships

First Data Corporation: First Data Corporation has been using Mindshare's software since 2005 to process more than 200 transactions per second 24x7x365. Output from Mindshare's solution serves as a non-repudiated Service Level Agreement of transactions between FDR itself, and their largest, contracted customers. Mindshare's solution projects issues centered on load, incomplete transactions and transactions with no response. This is critical for First Data in order to assure quality for their customers and provides them the ability to address potential issues before they occur.

Missouri Department of Transportation: Mindshare led one of the largest integration efforts known to the state of Missouri. This effort involved bringing together all customer services functions together in one single system for access by staff and customers alike. Interoperability between data sources was a key requirement that involved data matching, data analytics, and using business intelligence derived from the data to track and enforce internal controls. Mindshare worked together with Bentley Systems, CACI systems, Accpac and to succeed in this massive integration effort that seamlessly brought together the following critical DOT functions:

- International Fuel and Tax Agreement
- International Registration Plan
- Interstate Exempt / Intrastate regulatory Authority
- Single State Registration Systems
- Over Dimension and Over Weight permitting
- Hazardous Waste and Waste Tire Licensing
- Enforcement
- Accounting
- Administration

Mindshare used its library of technology along with IBM's integration stack to ensure maximum interoperability.

Pennsylvania National Guard/University of Pittsburg Medical Center: In January 2006, the University of Pittsburgh Medical Center (UPMC) announced that it received \$8.5 million from the House Appropriations Subcommittee on Defense, of which Congressman John Murtha set out to develop a strategic Bio-defense Emergency Operations and Communications system. Colonel P. Xavier Stewart, Ph.D., director of military support to civil authorities was the project director for the PA National Guard that implemented Congressman Murtha's vision.

Mindshare staff was engaged in mid 2006 due to its deep-rooted experience with large and complex systems. Mindshare continued to lead the project through October 2009.

The solution, architected by Mindshare, is known as PrepLink and establishes the foundation for an electronic bio-defense information network, to enable effective mass casualty care and integrated emergency response through information proliferation. Currently no community in the country has a capacity to efficiently and with speed manage thousands of critically ill individuals affected by a potential large, lethal bioterrorist attack. Mindshare has brought its capabilities to bear with architecture and software solutions for large-scale system integration, information intelligence, and data analytics to make this a successful project.

Public Schools, K-12: Various Public Schools including Burnett Middle School in Hillsborough County, Georgia Virtual School in Atlanta Georgia, Mississippi Virtual Public School in Jackson Mississippi, and Cumberland County Schools in Fayetteville, North Carolina have deployed Mindshare's Visibility Grid for Student/Faculty Awareness.

The Visibility Grid interacts with local school and/or centralized school district information systems to detect critical events that staff or students may benefit from. Such events are immediately distributed to recipients that are defined to receive the information. Further, real-time, automated interactions occur directly with faculty, students and parents for immediate awareness. Analysis of student behavior patterns detects critical aspects of repetitive problems to even the slightest decrease in productivity to ensure intervention is never too late.

5. Process for Collaboration with DHS

Should Eckerd be awarded the contract, a Project Director would be hired and deployed in Allegheny County in close proximity to Department decision makers and subject matter experts (preferably within the Allegheny County building, if possible). The Eckerd Project Director will serve as the liaison between the DHS project contacts and the Eckerd and Mindshare teams. In addition to the Eckerd Project Director, a Mindshare Business Analyst will also be deployed in Allegheny County. The pairing of two on-site staff combines subject matter expertise in human services along with data mining and analytics, allowing for an expedited process through the various phases of the proposed project.

The Eckerd Project Director and Eckerd Subject Matter Experts/Research Specialists will work with designated DHS subject matter experts in each of the five targeted indicators to understand the business process of the source data along with systems, methods, and protocols around the data collection and also expectations regarding what the data should measure and what outcomes should be supported. The Mindshare Business Analyst will then work with DHS representatives responsible for the Data Warehouse and ancillary data systems to design the decision support tools and predictive analytics.

6. Experience working with IT Vendors

Finally, the very collaboration proposed for Allegheny County represents the type of strong connection between the practitioner agency and IT vendor that the RFP solicits. Mindshare is a proven IT provider in predictive analytics and data-driven decision tools. Eckerd has worked in close partnership with Mindshare staff on a variety of collaborative projects, including the Eckerd Rapid Safety Feedback approach outlined earlier in this response. Using a model similar to the one outlined immediately above, Eckerd provides the organizing framework for the collaborative work through the development and maintenance of project schedules and communication tools and then trusts the experienced IT vendor to provide required deliverables and information in order to ensure success. In the particular case of Eckerd's and Mindshare's collaboration, a human services partner with over 46 years of experience combined with Mindshare's data systems expertise will provide Allegheny County with the best of both worlds; a provider with practitioner and systems level insights and experience with a solid IT partner and data solutions provider who has worked with Eckerd and other human services providers and understands the outcomes, the programs, and the processes for service delivery.

As a large national organization with programs in seven states; including two lead child welfare contracts serving over 6,000 children and youth each day, Eckerd has a strong IT department and the capacity to "speak the language" with other IT vendors in order to effectively implement and integrate solutions. For example, in the mid-1990s, Eckerd embarked on a transition of its dated Client Information System (CIS) to a more robust client data system - Totally Integrated Electronic Record (TIER®). Through close collaboration with Seaquest Technologies, Inc., the vendor that developed TIER®, Eckerd direct care subject matter experts and Eckerd IT specialists worked with the Seaquest developers to customize the clinical workflow and modules to meet the specific requirements of Eckerd and its contracting and accreditation entities.

The client information transition is a good example of Eckerd's approach in collaborating with IT vendors to integrate and implement solutions. After a negotiated agreement for services was established, Eckerd began a series of partner meetings with IT and subject matter experts from both Eckerd and Seaquest. A project lead was identified and implementation teams for both Eckerd and Seaquest worked together on a master project schedule that included key tasks, milestones, schedule, and responsibilities. The project leader was empowered to enforce the project schedule and to follow up on team member deliverables. Consistent and effective communication was emphasized and how the work was being performed was monitored—not just what work was being performed. At the stage of system implementation, the project team expanded its reach by recruiting practitioners to lead focus groups with other end users to evaluate the efficacy of the customization and to ensure that the system was tracking the right metrics. A continuous feedback loop of team member-to practitioner focus group-to developer was maintained throughout the scope of the project.

Eckerd is also currently partnered with several IT vendors for several critical projects. The vendors include CoCentrix to assist in the design and development of a new electronic health record, Taproot in the total redesign of the Eckerd website, and Tribridge to bring Eckerd's intranet into a sharepoint environment to create a collaborative space within which Eckerd functions will collaborate.

B. PROJECT DESCRIPTION (30 POINTS)

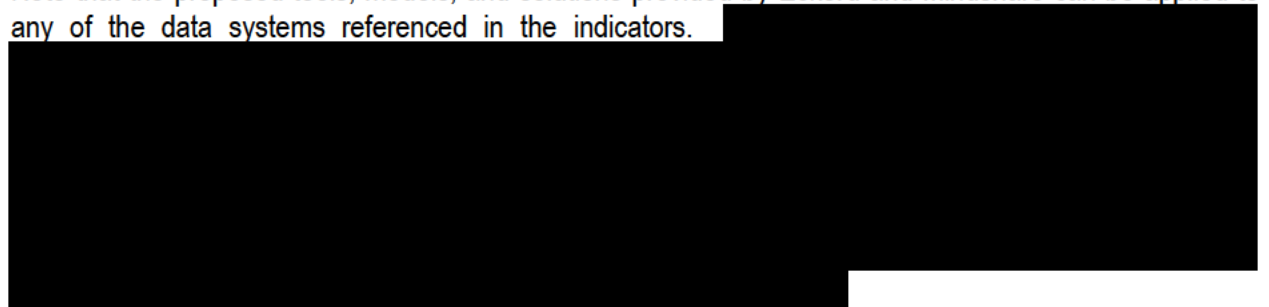
1. Project Goals and Objectives

a) Primary Indicators to be addressed using predictive models

For the proposed project, five key indicators will be targeted and address multiple questions in the bulleted list provided in the RFP on page 7:

1. Probability of future harm for child abuse cases
2. Probability of placements disruption
3. Probability of reunifications that will disrupt/fail
4. Probability of child welfare clients that will cross over (to JJ)
5. Probability of a child not achieving timely permanency



Note that the proposed tools, models, and solutions provided by Eckerd and Mindshare can be applied to any of the data systems referenced in the indicators.



This will provide an immediate and dramatic impact on Allegheny's system of care. Forward looking dashboards and decision tools will give insight into the permanency status of the entry cohort and the reciprocal relationship between the micro-level outcomes used at a case management level will roll up to suggest overall systems-level performance when viewed in the aggregate at a macro-level system outcomes.

c) Case Management Measures

An effective data driven model is moot if it does not inform case practice so that the probability of negative child outcomes are reduced. Data in and of itself—without appropriate case practice responses—is of little value. Eckerd's plan focuses on designing case management interventions that put feet to the data and ensure that desired results are being achieved at both the individual case and system level. Child level data dashboards that identify the specific children at highest risk for poor outcomes described above. See Attachment B for a specific example.



[REDACTED]

[REDACTED]

[REDACTED]

[REDACTED]

[REDACTED]

[REDACTED]

[REDACTED]

[REDACTED]

2. Services Consultation

a) Project Phases

Eckerd proposes a five-phase System Development Life Cycle (SDLC) for the proposed Allegheny project as illustrated in Figure 4

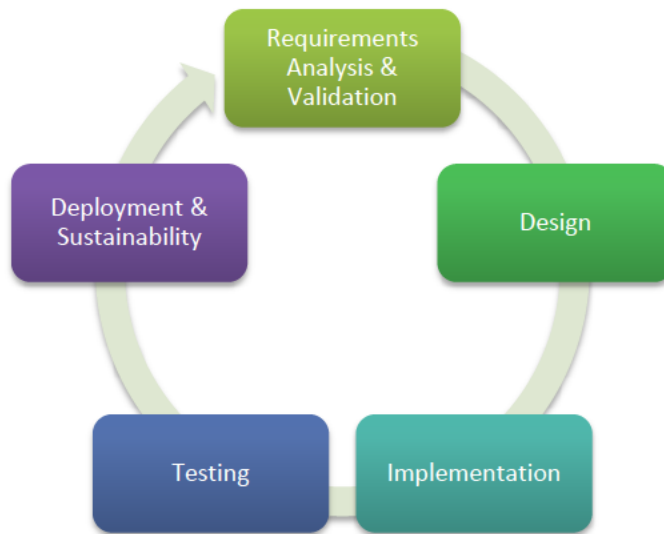


Figure 4: Proposed System Development Life Cycle

Phase 1 – Requirements Analysis and Validation: During this phase, Ron Zychowski (Chief of Quality, Eckerd), Greg Povolny, CEO of Mindshare, and the Eckerd Project Director will identify the project team that will include the Mindshare Business Analyst/Project Manager, Data Specialists, Research Specialists, and Programmer and Eckerd SME's and Research Specialists for each respective source of record that aligns to the requirement being addressed.

The Eckerd Project Director and Eckerd Subject Matter Experts/Research Specialists will work with designated DHS subject matter experts in each of the five targeted indicators to understand the business process of the source data along with systems, methods, and protocols around the data collection and also expectations regarding what the data should measure and what outcomes should be supported. The Mindshare Business Analyst will then work with DHS representatives responsible for the Data Warehouse and ancillary data systems to design the decision support tools and predictive analytics.

Phase 1 Deliverables:

The team will prioritize critical areas of impact and/or outcomes to target:

- For each critical area to be addressed identify the supporting data, its location(s), format(s) and access protocol(s). Data schemas to be provided in this phase.
- For each critical area to be addressed identify the cohorts required and the history accessible.
- Established requirements will be validated and a gap analysis will be produced.

Phase 2 – Design: During this phase, the project team will develop protocols for data access and access will be automated against the protocols.

After verification of the intended purpose and methods behind a data set, the Mindshare Business Analyst, Mindshare Data Specialists, and Mindshare Programmer will identify elements within the source of record(s) in the Data Warehouse and supplemental databases. This team will work closely with DHS staff

to identify the infrastructure, decision-making protocols, access, and logic of the various databases so that there is a clear understanding of data base composition and intention and also an understanding of the expectations regarding what is to be measured over verified by the data. Using the Visibility Grid (Extract, Transform and Load) ETL modules, the data of interest is consumed by the Visibility Grid data processing. The Visibility Grid™ is the underlying processing engine for Mindshare's tracking and analysis of Health and Human Services data sources.

Phase 2 Deliverables:

- Documentation for the requirements and design for each of the targeted systems will be published.
- Data will be processed via Mindshare's ADXL processing engine.
- Initial xtab dashboards for access and review will be produced.
- A model will be created.

Phase 3 – Implementation: During this phase (which repeats for each of the five targeted indicators), the project team will implement the model created in Phase 2.

Phase 3 Deliverables: During this phase, the data models will be used to:

- Produce predictions
- Automate entire process
- Process feedback
- Continue with additional requirements

Phase 4 - Testing: During this phase, the model will be tested and verified against protocols and expectations. Data validation will be performed to assure all subject matter is present and supports the requirement objective, and the performance of the model and classifier(s) will be tested and fine-tuned.

To illustrate the process from data validation to testing of outputs, please refer to figure 5 that outlines the proposed data process that will be used.



Referring to the diagram above, the following describes the data process in more detail:

- Step 1: Specific data of interest is identified respective to the requirements being addressed. Based on the access protocol agreed to the data is processed by the Visibility Grid ETL components (Life Cycle Phase 1: Requirements Validation)
- Step 2: If required, matching protocols are applied to connect corresponding records origination from disparate sources (for example, connection student records from DOE to KIDS records from DCF). Data is marked up with analytical meta-data and stored in the Visibility Grid Multi-Dimensional Data Repository. NOTE: All data at rest is encrypted using self-encrypting hard disks (SED) with enhanced secure erase capability (Life Cycle Phase 2: Design)
- Step 3: Once in the data repository with the respective mark-ups, the data can be applied to various predictive models supported by the Visibility Grid. The Visibility Grid will use the data and automatically generate training and test data sets to produce pre-defined predictive outcomes, each with an auto generated level of accuracy. As data is processed, a match protocol is applied (if disparate feeds must be related), and compiled (based on business rules defined by the State and/or DHS) using Mindshare's Analytical Data Markup Language (ADXL™). Once compiled the data's **meaning** is made available through several output channels (dashboards, web services, mobile devices, and alerts). (Life Cycle Phase 3: Implementation).
- Step 4: The Visibility Grid uses the pre-defined dashboard templates to provide various levels of data visualization. The Visibility Grid adds a new layer of Business Intelligence by combining data

interoperability and real-time analytics. The Visibility Grid can assure improved quality, productivity, efficiency and economies of scale through laser-focused use of data. The Visibility Grid provides a toolset for processing and compiling data from one or multiple sources and platforms (within or across the data warehouse, data marts, databases, and/or files) from disparate systems, departments and/or agencies. Intelligence is extracted from the data in a seamless fashion using non-intrusive, data acquisition techniques. Based on testing outputs, the models are refined and fine tuned (Life Cycle Phase 4: Testing).

- Step 5: The Visibility Grid applies user-defined profiles in order to detect a breach of thresholds, compliance or warning levels and will generate the respective alerts to individuals or distribution groups.
- Step 6: The Mobile App interfaces with the Visibility Grid infrastructure using secure Web Services. The app is a native app designed specifically for the productivity of Case Managers and Supervisors.

Phase 4 Deliverables:

- Documentation of modifications to models and protocols.
- Results of testing and refinements to be documented.

Phase 5 – Deployment and Sustainability: During this phase, the decision-making tools generated through the prior phases will be translated to dashboards that can be scalable for use at the individual case management level and roll up to provide a systems-wide view of performance on key indicators. As new information is culled from the ongoing implementation of the systems, refinements and modifications will be made to ensure that the system is sustained and adapted as required.

Phase 5 Deliverables:

- Training protocols for the decision tools and dashboards will be generated.
- Eckerd will provide training on tool deployment throughout the various levels of DHS as required.
- A manual documenting revisions made after deployment (based on system outputs, user reports, etc.) will be maintained.

For each of the five phases of the Systems Life Cycle and for each of the five targeted indicators, it is anticipated that the process will be completed within the first year. The sustainability component of the final phase may include an optional period of maintenance and refinement and can be negotiated in addition to services. During this period, hosting and support, unlimited enhancement of tools and data sets, model retraining, hardware blade, certificates, and bandwidth will be provided to ensure the data tools, databases, and predictive models remain current and accurate.

3. Program Integration

It is important to note that the proposed services will not require DHS to change, midstream, existing systems or enter new inputs into old or new systems. During the analysis and validation phase for each of the five indicators, the project team will look at what is currently being done and recommend opportunities to leverage existing capacity. The approach is to build upon and enhance existing tools and to propose strategies for integrating existing information technology and tools.

Regarding specific integration strategies, the project team will provide a range of integration techniques, methods and generate real-time, high impact dashboards, escalating alerts and mobile access for the most important information that pertains to an individual's day-to-day requirements. These dashboards, in most cases, will reflect integration of multiple databases and tools and will be addressed in Phase 2 (Design). These integrated tools will be designed to assist case workers, supervisors and system leaders alike. Mindshare also provides specialty tools for staff responsible for quality assurance and safety measures. Mindshare's ICARE™ module (Immediate Case Accountability and Risk Escalation) brings comprehensive insight of the data to the fingertips of the subject matter experts for state of the art decision-making tools that includes but is not limited to predictive analytics.

4. Project Timeline

For each of the five indicators and each of the five phases of the Systems Development Life Cycle, it is expected that a nine-step process will be completed. The phases and steps are as follows:

Phase 1 – Requirements Analysis and Validation

- Step 1: Requirements analysis and validation 2 weeks
- Step 2: Data validation 2 weeks
- Step 3: Data Access / Feed automation 1 week

Phase 2 – Design

- Step 4: Pre-processing / Model Preparation 2 weeks
- Step 5: Prediction Training 3 weeks

Phase 3 – Implementation

- Step 6: Dashboard Creation / Cross Tabulations .5 week
- Step 7: Implementation Business Rules .5 week

Phase 4 – Testing

- Step 8: System testing and fine-tuning (varied)

Phase 5 – Deployment and Evolution

- Step 9: Tool Deployment and Training 4 weeks

If done sequentially for each of the five indicators, the project would take over two years. Eckerd and Mindshare, however, are proposing the simultaneous development of Indicators 1 and 2 (scheduled through project weeks 1 through 15) and with an incremental build approach that would stagger the start of Indicators 3 through 5 (scheduled for project weeks 17 through 32). By following this ambitious timeline, requirements can be validated within two weeks, and an operational environment can be created in short order. This is one of the competitive differentiators of choosing Eckerd and Mindshare for this project. Our approach does not require the reconstruction of another data warehouse as is common for other commercial offerings. Our approach using the existing data and its protocols through the use of the subject matter experts who can act on the dashboards and data tools to make sure they are relevant to the systems and to case level indicators.

5. Project Examples

Please see **Attachment B** for a sampling of tools/systems already developed by Eckerd and Mindshare.

6. Staffing Plan

The proposed staffing plan includes seven FTE's (two provided by Eckerd and five provided by Mindshare). Titles, roles, qualifications and credentials are summarized in the table below.

Position	Name	Project Role	Qualifications/Credentials
Project Director (Eckerd position) One (1) FTE	TBD	To be primary contact to DHS and oversee project schedule, deliverables and overall program operations. Serve as liaison to Mindshare and Eckerd teams, primary contact to DHS. Defines project requirements by identifying project milestones, phases, and elements; forming project team; establishing project budget. Monitors project progress by tracking activity; resolving problems; publishing progress reports; recommending actions.	Master's Degree in human services field with three or more years of progressively responsible experience in system design, evaluation, or improvement. Bachelor's degree in lieu of masters for candidates with seven or more years of directly applicable experience in providing services similar to the proposed program scope.
Research Specialist (Eckerd position) Part-Time (.5)	Kathy Bartlett	To serve as subject matter expert to work with DHS and Mindshare team to determine how the data is gathered, expectations of the data, clarification of outcomes, and case practice implications. Recommends controls by identifying problems; writing improved procedures	Thirty three years of experience in child welfare including county and state governmental entities, private companies as well as private non-profit organizations. Public service positions have ranged from direct service as a caseworker in a county child welfare agency to managing the bureau office responsible for the oversight of the eighty-eight child welfare agencies in the State of Ohio. Private non-profit experience was as the Director of the Franklin County Court Appointed Special Advocates (CASA) program responsible for all financial and operating affairs. As a consultant for JBS International provided training for Child Welfare Information System (CWIS) project staff on behalf of the Administration for Children and Families (ACF). Direct system experience includes over ten years' experience with business and systems analysis in the design and implementation of CWIS large mainframe and web-based projects. Bachelor of Science Social Work, BSSW, Ohio State University.

Position	Name	Project Role	Qualifications/Credentials
Research Specialist (Eckerd position) Part-Time (.5)	Bryan Lindert	To serve as subject matter expert to work with DHS and Mindshare team to determine how the data is gathered, expectations of the data, clarification of outcomes, and case practice implications. Recommends controls by identifying problems; writing improved procedures	Experience includes a proven history of turning data into actionable information, significant strategic planning, and over 11 years of progressively responsible positions in social work and government management. Oversight responsibilities have included acting as the Program Operations Administrator for three DCF Service Centers and three programs with each position managing 20+ employees. Maintained key partnerships with CSC, Law Enforcement, CBC's, Substance Abuse, DCF and Domestic Violence organizations. Previously served as the Circuit 15 Convener for Florida's Child Abuse Prevention Plan and a System Manager for Healthy Beginnings System of Care. Sterling Examiner and Lean Six Sigma certifications supplement education in Strategic Planning. Mr. Lindert received his Bachelor's of Arts from the Woodrow Wilson School of Government at the University of Virginia.
Business Analyst (Mindshare position) 1 FTE	TBD	To be the primary contact regarding IT, data and predictive models for proposed project. Will work closely with Project Director and designated DHS staff responsible for Data Warehouse and ancillary data systems to understand data architecture, access, protocols, and methodologies in order to extract data for predictive modeling and tool development. Determines operational objectives by studying business functions; gathering information; evaluating output requirements and formats. Analyzes requirements; constructs workflow charts and diagrams; studies system capabilities; writes specifications. Improves systems by studying current practices; designing modifications. Maintains system protocols by writing and updating procedures.	Bachelor's degree with minimum of three years high level experience in business analysis. Master's degree preferred. Experience with C, COBOL, Software Design, Software Documentation, Software Development Process, Software Requirements, Analyzing Information, Teamwork, Software Maintenance, Written Communication, Promoting Process Improvement, data systems, and predictive analytics preferred.

Position	Name	Project Role	Qualifications/Credentials
Data Specialist (Mindshare positions) 2 FTEs	TBD	To work with existing Data Sources and identifying key data attributes to be extracted, transformed, and loaded into new data sources to be made available for input into the predictive modeling component. The candidate will be interfacing with the existing DHS data warehouse, designing, implementing, and scheduling of ETL processes and target data models. This position will work closely with the Business analyst and programmers.	Bachelor's Degree with minimum of 5 years experience working with large disparate data sources and Business Analytics. Masters preferred. Experience analyzing data, writing complex SQL Queries, Design and implementation of ETL processes, Ability to utilize analytic applications to identify trends in data, Predictive Analytics including classification of data for predictions, Statistics, and Large Scale Distributed Systems. Experience with Source Code Controls (Git or SVN). Java experience preferred.
Programmer (Mindshare positions) 2 FTEs	TBD	To serve as programmer, responsible for accessing data marts specifically designed for input into predictive models, development of dashboards to aid in the analysis of key data attributes or features, automation of training and testing of predictive models, evaluation of model performance, and making predictions from the trained models. The candidate will also be responsible for developing web services, designing implementing, and testing HTML5/javascript dashboards to display model evaluation output, predictions in java web-based environment.	Bachelor's Degree with minimum of 3 years experience working with server side Java and HTML/Javascript frameworks. Strong skills in Object Oriented design and principles, Java EE, JAX-WS , JPA, JUnit, Javascript frameworks such as JQuery and ExtJs using Ajax. Java Application server experience (JBoss or WebSphere). Eclipse IDE, source code control (Git or SVN). Strong communication skills. Mobile development experience with iOS and Android preferred.

Additional Support provided through oversight, coordination, and supplemental services delivery include

Name	Title	Project Role	Qualifications and Credentials
Ron Zychowski	Chief of Quality, Eckerd	Project Consultant. Will supervise Eckerd Project Director.	Ron Zychowski has a proven track record spanning more than 30 years of senior leadership positions in a variety of disciplines, with nearly two decades spent directly in human services management positions. His experience includes over 20 years in child welfare leadership administration including Center Director for Head Start, District Administrator for Florida DCF, and CEO of three Florida Community-Based Care Lead Agencies. Mr. Zychowski also served in the U.S. Army for 25 years. He is well-versed in developing and directing large, multi-faceted staffs and also experienced in developing and executing multi-million dollar budgets – including the complex state and federal funding streams affiliated with child welfare systems of care. MBA from the University of Alabama and a BA from the University of Delaware.

Name	Title	Project Role	Qualifications and Credentials
Greg Povolny	CEO of Mindshare Technology	Project Consultant. Will oversee development of decision tools, dashboards, and models and will supervise the Business Analyst position	Prior experience as a senior engineer at two independent software companies, responsible for the architecture of a worldwide product configuration engine for all IBM software and hardware product knowledge. Subject matter expert with messaging middleware and team member of Lotus Technology due-diligence team that later resulted in the acquisition of Lotus Corporation by IBM, task force member for the U.S. Office of Management and Budgets. Expertise in online security systems for network, intrusion detection and authentication. Established Mindshare Consulting Group in 2002 to produce offerings for data interoperability and real-time analytics.
Robert A. Batson	President of Mindshare Technology	Consultation and oversight.	Prior senior management responsibilities include development of personnel and the growth of sales revenues over an eleven year span at IBM Corporation, management of growth and revenue in midtown Manhattan marketplace for Citibank. As part of EDS, established relationships with designated Senate and House of Representative offices and successfully expanded EDS business relationships in many state governments. At Atos Origin and Verizon Information Technologies, responsibilities included global relationship development. His sphere of influence was cause for European travel and business relationships as well as a two-year assignment in Mexico City.
Greg Schmitt	Senior Architect, Mindshare Technology	Consultation and oversight to business analyst and project team	Experiences and credentials include 15 years of Java/Web product development (application, servlet, JSP), Sun Certified Programmer (1999) and Developer for the Java2 Platform (2000) 13 years of IBM WebSphere MQ. Skill sets span all phases of the development life cycle. Strong Architecture and Object Oriented (OO) analysis and design skills. Responsible for predictive analytics project development for Mindshare. Previous architecture and client/server solutions for Mobile, PRT Hub, TAPD & PSAM, and SIMS, Senior engineer at Open Text, Inc (Formerly Metastorm & CommerceQuest), Nexus, EnableNet, MQItester for HP LoadRunner, and ExpertMQ.

Please see **Attachment A** for resumes of existing staff to be affiliated with the proposed program.

C. REFERENCES (20 POINTS)

Mike Carroll Regional Managing Director SunCoast Region Department of Children and Families 9393 N Florida Avenue Tampa, FL 33612 Phone: (813) 337-5808 Email: Mike_Carroll@dcf.state.fl.us	Linda Jewell Morgan, MSW Senior Director, Strategic Consulting Casey Family Programs 2001 Eighth Avenue, Suite 2700 Seattle, WA 98121 Cell: (727) 455.4077 E-Mail: L.Morgan@casey.org	Cliff Denholm Chief Executive Officer SMA Technology Group 4280 Old William Penn Highway Monroeville, PA 15146 Phone: (412) 646-4078 Email: cdenholm@sma-technology.com
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Please note: Attachment A (Resumes) and Attachment B (Tool Examples) are packaged separately as documents (word version unavailable) as part of Eckerd's Proposal

RONALD M. ZYCHOWSKI

3729 Covington Dr, Holiday, FL 34691 | 727.631.7208 | rzychowski@eckerd.org

EDUCATION

University of Alabama

MBA

1979

Beta Gamma Sigma Graduate

University of Delaware

B.A. – Political Science

1968

PROFESSIONAL EXPERIENCE

Eckerd

Chief Quality Officer

2013

Provide Quality Management and Improvement support to Operations which has led Eckerd to exceeding performance targets on our Board's Performance Budget; Assisted in raising Circuit 6's Performance from 16th to 9th place on the State's Performance Scorecard.

Chief Operating Officer

2010 - 2013

Improved outcomes in all programs; achieved the highest Quality Ranking from the State in 7 of 8 Juvenile Justice Programs; assisted in transforming and growing Eckerd to a \$150M company in 6 states.

CEO – Community Partnership for Children

2005 - 2010

Led a Child Welfare company to one of the best in the state; safely reduced the number of children in foster care by 36% and the number of children in the dependency system by 32%; finalized over 600 adoptions with over 40% completed within 24 months of removal.

CEO – Community Based Care of Seminole

2004 - 2005

Started this company from scratch as first employee; secured state contract and transferred over 600 children from state to private supervision.

Florida Department of Children and Families**Wide Range of Senior Management positions in 4 Districts****1995 – 2004**

Closed one of Florida's State Hospitals and transitioned over 100 mentally patients back to their communities with improved community supports; improved the integration of Child Welfare and Substance Abuse Services; consistently among the leaders in the state on Child Abuse Investigations performance measures; balanced every annual budget; successfully transferred the supervision of over 4,000 children in Hillsborough County from the department to private community based care lead agency.

BRYAN LINDERT

4242 Dartmouth Ave N, St. Petersburg, FL | 813-951-0055 | blindert@eckerd.org

EDUCATION

University of Virginia, Charlottesville VA

B.A. in Government

2001

Concentration in Political Theory and Public Policy

LICENSES, CERTIFICATIONS, & MEMBERSHIPS

Certified Quality Assurance Reviewer

2012

Six Sigma Green Belt

2008

Certified Child Protection Professional (CPI)

2003 and 2013

Sterling Examiner

2006

Child Abuse Death Review Team (served in Tampa Bay and Palm Beach County) **2008-2013**

PROFESSIONAL EXPERIENCE

Eckerd Community Alternatives

Director of Quality Management

2012-2013

Currently manage all QA activities for Circuit 6 and Circuit 13 inclusive of all reviews required by the Department of Children and Families and by Eckerd including launching the Rapid Safety Feedback Review to reverse a pattern of child fatality in Circuit 13 using predictive analytics.

Managed a division of 10 staff outposted in three counties.

The Children's Services Council of Palm Beach County

Program Officer and Child Abuse Prevention Manager

2009-2012

Lead Child Abuse Prevention Planning and co-managed system development for the Council's Healthy Beginnings System of Care; a comprehensive system of primary prevention services focused on early learning, abuse prevention, and healthy births. Acted as primary operational liaison between the Council and its child welfare partners. Partnerships included Drug Court, Cribs for Kids, Touchpoints training, and reduction of DV related entries into Dependency. Assisted the Council's CEO on the Subcommittee on Safe Families and other advocacy panels. Selected presenter to CWLA and the DCF Dependency Summit on various Evidence Based Program and Child Welfare issues. Managed the Council's legal advocacy projects including the Foster Children's project.

The Florida Department of Children and Families

Investigations Specialist

2007-2009

Provided data analysis and policy expertise to child and adult protective services programs. Acted as Program Operations Administrator on an interim basis for western Palm Beach County. Created Domestic Violence Certification for Child Protective Investigators recognized by FCADV. Selected presenter to 2009 FCADV conference. Reduced Adult Protective Investigator turnover from over 100% annualized to 0% in 2008 resulting in Davis Productivity Award recognition.

Child Protective Investigator Supervisor

2006 –2007

Managed a staff of 6 investigators and additional support staff responsible for more than 75 investigations monthly. Acted as Program Operations Administrator on an interim basis for northern Palm Beach County.

Child Protective Investigations Specialist

2004-2006

Provided data analysis and policy guidance to child protection program. Served a primary liaison for the law enforcement and child protection joint investigation protocol. Completed all second party (high risk case reviews) for seven investigations units. Supervised the family support worker unit; providing transport and service referrals to open investigative cases.

Child Protective Investigator

2002-2004

Investigated 12-20 cases of abuse and neglect monthly; making services provision and placement decisions. Recognized as the only CPI to be sent to the CWLA annual conference for Circuit 15.

KATHY BARTLETT MELAND

PROFESSIONAL SUMMARY

Thirty three years of experience in child welfare including county and state governmental entities, private companies as well as private non-profit organizations. Public service positions have ranged from direct service as a caseworker in a county child welfare agency to managing the bureau office responsible for the oversight of the eighty-eight child welfare agencies in the State of Ohio. Private non-profit experience was as the Director of the Franklin County Court Appointed Special Advocates (CASA) program responsible for all financial and operating affairs. As a consultant for JBS International provided training for Child Welfare Information System (CWIS) project staff on behalf of the Administration for Children and Families (ACF). Direct system experience includes over ten years' experience with business and systems analysis in the design and implementation of CWIS large mainframe and web-based projects.

SUMMARY OF QUALIFICATIONS

- Thirty-three years' work experience in child welfare including:
 - Child welfare program administration;
 - Child Welfare Information System (CWIS) project management;
 - Private non-profit management; and
 - Direct service.

EXPERIENCE AND ACHIEVEMENTS

11/13 to Present Eckerd Youth Alternatives Clearwater, FL

Director of Data and Reporting

- Supports Chief Information Officer to analyze, coordinate and evaluate business requirements, processes, and user needs
- Responsible to facilitate more informed decision-making across the organization by ensuring that data systems afford all levels of management and leadership with client information, production and performance data
- Oversees and coordinates data mining and analysis activities
- Coordinates data requests for external reporting needs to funders, providers and partners
- Supervises the Data and Reporting Services staff and contributes to departmental budget planning process

10/12 to 10/13 Dynamics Research Corporation (DRC) Tallahassee, FL

Lead Functional Manager FL SACWIS (Florida Safe Families Network - FSN)

- Manages all aspects of FSN enhancement project
- Supervises staff of five business analysts
- Coordinate efforts among design, development, reports and testing teams
- Facilitates and supports User Acceptance Testing
- Prepares communication packet for end user's

- 7/10 to 9/12 Child Welfare Consultant Nashville, TN
State Information Technology Consortium/JBS International
- Developed and provided training for Child Welfare Information System (CWIS) project staff on behalf of the Administration for Children and Families (ACF)
 - Training provided:
 - Regional Training sessions for IT/Program staff
 - Webinars and webcasts.
 - Develop Adobe self-paced web courses
 - Planned and implemented annual national child welfare training conference for CWIS project staff.

- Accenture*
- Project team member for development of proposal for Michigan SACWIS project
 - Federal Review, Requirements and Interfaces

- 4/08 to 6/10 Dynamics Research Corporation (DRC) Nashville, TN
Business Analyst, TN SACWIS Project
- Team lead for Case Management
 - Facilitated and managed a team of TN case managers through process of Rapid Requirements Definition (RRD) and Joint Application Design (JAD) sessions.
 - Prepared team design documents for submission for formal acceptance
 - Analysis of Tennessee business process as well as Federal SARGE requirements to ensure that system is SACWIS compliant
 - Responsible for all aspects of scope management and requirements traceability
 - Assisted in the development of TN SACWIS curriculum and CBT.
 - Developed scripts for testing and executed manual testing.
 - Supported User Acceptance testing and TFACTS Implementation

- 4/04 – 4/08 Ohio Department of Job and Family Services Columbus, OH
SACWIS Project Manager
- Directed and managed five business teams during requirements definition sessions, joint application and design, and user acceptance testing phases of the project. This included:
 - planning the requirements phase;
 - establishing the requirements process;
 - managing requirements changes;
 - tracking progress and identifying inconsistencies in team work products; and
 - assisting user community address change management issues in rural, medium and metropolitan counties for a state supervised – county administered state.
 - Project utilized Integrated Project Team (IPT) model to accomplish jointly defined and agreed upon project goals.
 - Assisted in the development of Federal Advanced Planning Documents and all other federal submission requirements.
 - Developed project plans, established project priorities and time frames for completion.

- 8/01 – 4/04 Court Appointed Special Advocates Columbus, OH
Executive Director
- Managed all financial and operating affairs of local private non-profit Court Appointed Special Advocates (CASA) program recognized as one of the top fifteen CASA programs nationally based on size, quality management and effectiveness of advocacy services.

- Responsible for resource development, strategic planning, volunteer management, legislative advocacy, grants administration, public relations, and standards-based quality compliance.
- Planned and successfully held three annual “Speak Up for Children” breakfasts following the “Raising More Money” (RMM) model designed to build a base of life-long donors.
- Raised over \$320,000 utilizing the RMM model.
- Increased annual budget by nearly 100% in two-year period.
- Designed and implemented annual cultivation plan.
- Managed staff of ten employees, including five attorneys.

8/00 – 8/01 Franklin County Children Services Columbus, OH
Program Administrator, Office of Legal Services

- Managed all aspects of agency-wide implementation of the Adoption and Safe Families Act (ASFA) including legal, program, management information systems, and quality assurance.
- Partnered with Franklin County Juvenile Court and community service providers to improve coordination and collaboration efforts to enhance permanency for children.
- Coordinated with county and state representatives to develop local Drug Court.
- Analyzed pending legislation, laws and rules and identified agency implementation issues.

5/99 – 8/00 Ohio Department of Human Services Columbus, OH
Bureau Chief

- Managed all aspects of state-wide child welfare system including policy, program development and implementation, budget initiatives and technical assistance for eighty-eight public child welfare agencies in Ohio.
- Supervised staff of forty-five persons, including eleven direct reports.
- Represented ODHS on child welfare issues at a national level with the following organizations: American Public Human Services Association, Child Welfare League of America, Health and Human Services, Administration for Children and Families.

1/98 – 5/99 Ohio Department of Human Services Columbus, OH
Assistant Deputy Director

- Planned, directed and administered state-wide human service program operations including Child and Adult Protective Services, Child Care, Ohio Works First (Welfare to Work) and Temporary Assistance for Needy Families (TANF).
- Supervised on-going administration of program operations at central office and district levels for 120 staff persons.
- Responsible for design and development of program policy integration of the state-wide Automated Child Welfare Information System (SACWIS).

1/96 – 1/98 Ohio Department of Human Services Columbus, OH
Assistant to the Deputy Director

- Provided assistance to the Deputy in establishing direction for the office and all aspects of policy-making including program development and fiscal decision-making for child and adult protective services, child care, and Children’s Trust Fund.
- Developed AdoptOHIO program that was duplicated on a national level. Program successfully increased adoptions in Ohio by 10% from 1997 to 1998.

- Liaison between Deputy Director and Bureau Chiefs, Section Chiefs and other ODHS management staff.

8/93 to 1/96 Ohio Department of Human Services Columbus, OH
State-wide Multi-disciplinary Rapid Response Team, Social Worker

- Investigated and criminally prosecuted complex child abuse cases at the request of county agencies. State-wide team members included an Assistant Attorney General, law enforcement officer and social worker.
- Achieved convictions in twenty-eight of thirty-six cases.
- Provided case consultation/technical assistance; medical, legal and mental health research.
- Provided nationwide multi-disciplinary training.
 - Certified trainer for Ohio Police Officer's Training Academy (OPOTA) and Bureau of Criminal Identification and Investigation (BCI&I),

7/86 to 8/93 Ohio Department of Human Services Columbus, OH
Social Program Developer

4/84 – 7/86 Big Brother/Big Sisters Association Columbus, OH
Case Manager

9/83 to 12/83 Department of Human Services Louisville, KY
Case Manager III

1/83 to 5/83 Hamilton Department of Human Services Cincinnati, OH
Case Manager II

7/81 to 10/82 Fairfield County Children Services Lancaster, OH
Case Manager

EDUCATION

The Ohio State University, Bachelor of Science Social Work, BSSW, June 1981

VOLUNTEER

CASA of Nashville, TN

REFERENCES AVAILABLE UPON REQUEST

Gregory S. Povolny

Executive BIO

In July of 1990, after working as a senior engineer at two independent software companies, Greg accepted a position with IBM to implement systems that would automate the micro-code testing of the IBM 3090 mainframe. Greg's role expanded into client server development where Greg was responsible for the architecture of a worldwide product configuration engine for all IBM software and hardware product knowledge. Greg became a subject matter expert with messaging middleware and was invited to be part of the Lotus Technology due-diligence team that later resulted in the acquisition of Lotus Corporation by IBM.

In March of 1995 Greg accepted a founder's position in Technology Investments Inc., later CommerceQuest and one of the Internet Capital Group companies – NASDAQ: ICGE. Greg's objective for Technology Investments was to transition the company from a professional services company of five people, to a world class software products company. Late 1995 the first product was unveiled at the Networld Interop conference and won Best of Show. Greg's role in development was the inception of new product ideas and having them fulfilled through his newly formed development organization. Greg was responsible for delivering such technology across over 30 different hardware platforms and operating system versions. Greg's product ideas and implementations generated over \$50 million dollars of revenue over a period of 5 years.

In 1999 Greg Povolny filed for 11 patent claims (application number 09/306790) documenting the invention as a strategic data integration capability using asynchronous communications for mass data movement. The patent was later awarded as United States Patent 6850962.

In 2002 Greg was requested by name to participate in a task force for the United States Government's department of OMB (Office Management and Budgets). The meeting was conducted at the White House and hosted by Mark Foreman, director of IT and e-government for the agency. Greg has the unique background in online security systems for network, intrusion detection and authentication required for this project. This includes public key infrastructures across global infrastructures.

In 2002, Greg formed and self funded Mindshare Consulting Group, LLC d.b.a Mindshare Technology. Mindshare Technology is a specialty firm focused on services and solutions within the United States. Mindshare Technology has product offerings for data interoperability and real-time analytics. Mindshare has been called upon by lead community based care agencies within the Florida's Department of Children and Families, PA National Guard, MO Department of Transportation, and First Data Corporation.

In January 2006 the University of Pittsburgh Medical Center (UPMC) announced that it received \$8.5 million from the House Appropriations Subcommittee on Defense, of

which Congressman John Murtha set out to develop a strategic Biodefense Emergency Operations and Communications system. Colonel P. Xavier Stewart, Ph.D., director of military support to civil authorities is the project director for the Pennsylvania National Guard that will oversee Congressman Murtha's vision.

Greg was engaged in mid 2006 through January 2010 at the recommendation of IBM due to his deep rooted experience with large and complex systems. The project is now entering its 4th year and Mindshare continues to lead the effort with the technology blueprint. Not only is the solution deployed across various regions in Pennsylvania but through relationships, Mindshare has brought the solution to Florida where the Tampa Bay Crisis Center is online and operational, using the capabilities of online collaboration, mass communications and incident command.

The solution, known as PrepLink establishes the foundation for an electronic bio-defense information network, to enable effective mass casualty care and integrated emergency response. Currently, no community in the country has a capacity to efficiently and with speed, manage thousands of critically ill individuals affected by a potential large, lethal bioterrorist attack. Mindshare has brought its capabilities to bear with architecture and software solutions for large scale system integration, information intelligence, patient and victim tracking, blood supply inventory and routing, and more.

Mindshare's groundbreaking research, led by Greg Povolny, helps vulnerable children and families and allows non-government and faith based organizations new approaches to interoperate effortlessly. Mindshare is looking to work with city and regional leaders to assure such capabilities are available at a national level.



Robert A. Batson
Executive Biography
President

Bob brings to Mindshare Technology a broad background of sales, general management and senior management responsibility.

He is accustomed to dynamic, diverse business interaction and requirements and brings superb relationship-building skills to marketplace opportunities.

Bob's experience includes senior management responsibilities at world-class corporations as well as senior roles in two start-up ventures. He was instrumental in the development of personnel and the growth of sales revenues over an eleven year span at IBM Corporation and was a consistent member of IBM's 100% club, which recognizes sales and sales management excellence.

At Citibank, Bob was responsible for the management and growth of revenue in a hotly contested midtown Manhattan marketplace. He and his team consistently achieved objectives and were effective in broadening Citibank's relationships with the City of New York.

In an approximate five-year span with EDS, 100% of his time and efforts were committed to state and local government. From an EDS office in Washington, Bob consistently developed relationships with designated Senate and House of Representative offices and successfully expanded EDS business relationships in many state governments. He is accustomed to visiting with high-ranking state officials, including state governors.

At Atos Origin and Verizon Information Technologies, Bob's responsibilities included global relationship development. His sphere of influence was cause for European travel and business relationships as well as a two-year assignment in Mexico City.

In his many diverse assignments, Bob has always maintained focus, business discipline and a commitment to fair, profitable relationships as well as the development and growth of staff.

His record is one of consistent achievement, superior business ethics and creation of long-term, respectful relationships.

Ed Schmitt

Summary

- 15 years of Java/Web product development (application, servlet, JSP)
- Sun Certified Programmer (1999) and Developer for the Java2 Platform (2000)
- 13 years of IBM WebSphere MQ
- Skill sets span all phases of the development life cycle
- Strong Architecture and Object Oriented (OO) analysis and design skills

Technology Summary

<i>Languages</i>	Java, JSP, C# JavaScript, PHP, C, SQL, HTML
<i>Platforms</i>	Windows, UNIX, Macintosh
<i>Operating Systems</i>	Windows 7, AIX, Solaris, Linux, HP-UX, IOS, Android
<i>Databases</i>	MS SQL Server, DB2, MySql, Oracle, MS Access, SQLite
<i>Application Servers</i>	Tomcat, JBOSS, WebSphere Application Server, IIS, Google App Engine, WASCE, XAMPP
<i>Tools/Configuration Management</i>	Git, CVS, ANT, Maven, Subversion, Visual Studio 2010, Team Foundation Server (TFS), Eclipse, Visual Source Safe, NuGet, IntelliJ
<i>Testing</i>	JUnit, NUnit, MSTest, LoadRunner
<i>Other</i>	Struts 2, XML, JSON, ExtJS, REST, JAXB, JMS, AJAX, JMX, JMS, JDBC, JNDI, JNI, RMI, JAAS, MDB, Camel, Apache Commons, Jersey, Restlet, Restkit, log4j
<i>Middleware</i>	WebSphere MQ, Active MQ

Experience

Product Development, Mindshare Consulting Group, LLC.

2003 – Present

Deeply involved in many technical facets of the organization spanning 10+ years. Providing architectural guidance along with developing and maintaining several projects. Duties also included the selection of development tooling to be used as company standard.

■ Predictive Analytics

Used machine learning to design modules for predicting and presenting outcomes in a user friendly way. This included the gathering of large amounts of data from disparate sources, the subsequent pre-processing of the collected data to train models, and using the trained model to generate predictions on current data. Several algorithms were used, including but not limited to the following: Random Forest, C4.5, Multilayer Perceptron, Logistic, and Linear Regression. Training of the models included varying the attribute selection used, tuning model parameters, testing of the model using cross validation and split data sets, and interpreting the evaluation of the model performance on the training and test data. During model evaluation, model statistics such as percent correct, the confusion matrix, and ROC area were consulted to determine if the model was a satisfactory fit. Finally, the model was used to generate predictions on the current data and displayed to the end user.

- Mobile

Architected and developed client/server iPhone/iPad applications to allow Case Workers and Supervisors to manage their case load effectively from their mobile device. Server side was developed using RESTful web service architecture to allow multiple client devices platforms to share the same server. Client side persistence implemented using SQLite and Restkit framework.

- PRT Hub

Added new functionality and maintained web-based PHP application used for managing Permanency Round Tables. Included the design and development of forms for entering information and report viewing capabilities.

- TAPD and PSAM

Designed, implemented, and maintained web-based PHP applications.

- SIMS

Architected, Designed and Developed the web-based component of the application in Java using Struts 2 as the application framework.

System Engineer, OpenText, Inc. (Formerly Metastorm and CommerceQuest)

1997 - 2014

- Provision/Knowledge Exchange (PV/KE)

Simultaneously held Scrum Master and Senior Developer roles. Mainly adding new features and functionality to Knowledge Exchange Server, a Java based change control and collaboration server for enterprise modeling.

- Developed new functionality using Core Server side Java.
- Performed Scrum Master Duties /Team Lead Duties.
- Expanded Web Services functionality using Jersey for REST and JAXB to marshal objects.
- Extracted Data from product to be leveraged by a Third Party Reporting Tool.

- Smart Business Workspace

Designed and developed a .NET web based RIA and supporting WCF data services that performed core functionality of a UX Framework for external development teams.

- Applied WCF RESTful data services for the server side and Silverlight for the browser.
- Developed Instant Messages Functionality and other application widgets to be hosted in the framework.
- Applied Scrum methodologies.

- Metastorm Integration Manager (MIM)

Designed, developed, maintained, and tested a java based web-based application responsible for allowing users to manage file transfer requests, view their status, manage and monitor large enterprises, and manage user profiles.

- Designed and developed the Web application for MIM using Tomcat and JBOSS. The application included node management for thousands of endpoints, dashboards, request management, and topology design.
- Applied a mix of JSPs and the ExtJS/javascript framework with AJAX to develop presentation layer.
- Server implementation incorporated the use of Struts 2, JDBC, log4j, JAAS, JMS, and JMX.
- Designed WebSphereMQ messages used to communicate with shared services on distributed platforms.
- Developed a Java registry service that stored and retrieved configuration for thousands of nodes.

■ Nexus

Designed and developed a file transfer service and supporting services written in Java.

- Used Active MQ as the transport layer and Apache Camel to setup the routes and endpoints for control messages and data.
- Worked closely with Product Management to gather and prioritize requirements.

■ EnableNet

Designed, developed, and tested a multi-tier distributed application responsible for directing users through a complex web-based screen flow, which allowed interactions with a large Database.

- Developed the presentation layer using Java Server Pages (JSPs) and Java Beans.
- Handled control of requests from JSPs using Java Servlets.
- Developed reusable Java based workflow components that handled business logic and data logic operations.
- Applied WebSphere MQ for messaging between workflow components and servlet.
- Created XML documents to represent data flowing through the system.
- Lead project team.

■ MQTester for HP LoadRunner

Designed, developed, and maintained a custom WebSphere MQ Virtual User type using the C language that records and replays WebSphere MQ API calls in the HP LoadRunner Performance Testing Suite.

- Applied C/C++ programming languages in the MS Visual C++ development environment.
- Coordinated development between Mercury Interactive and internal staff.
- Applied WebSphere MQ C API extensively.
- Developed InstallShield for MQTester product.

■ ExpertMQ

Designed and Developed a Java Swing based UI that configured and monitored IBM's WebSphere MQ.

- Designed and Developed many complex graphical user interfaces (GUIs) using Swing.
- Applied Java's threading technology in the UI and in the application servers.
- Used JDBC to communicate with the backend database (Sybase and DB2).
- Used JNI when necessary to communicate with native code, such as WebSphere MQ and third party products.
- Applied proven OO design principles.
- Achieved communication between components using RMI.
- Used XML to communicate between clients and servers.
- Created several reusable GUI widgets.
- Performed analysis to find memory leaks and performance bottlenecks.

Assistant Engineer, Michael Baker, Jr., Inc.

1993 - 1995

- Evaluated revision requests to the Federal Emergency Management Agency (FEMA) National Flood Insurance Program (NFIP).

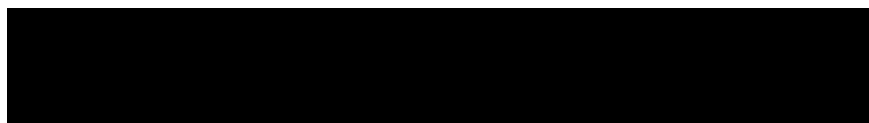
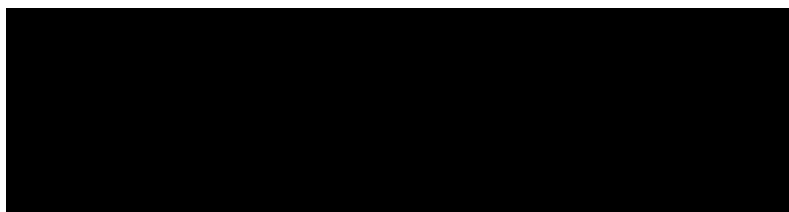
Education

Virginia Tech, Blacksburg, VA
B.S Civil Engineering

1988-1993

University of South Florida, Tampa, FL
Completed 3 semesters of MIS coursework

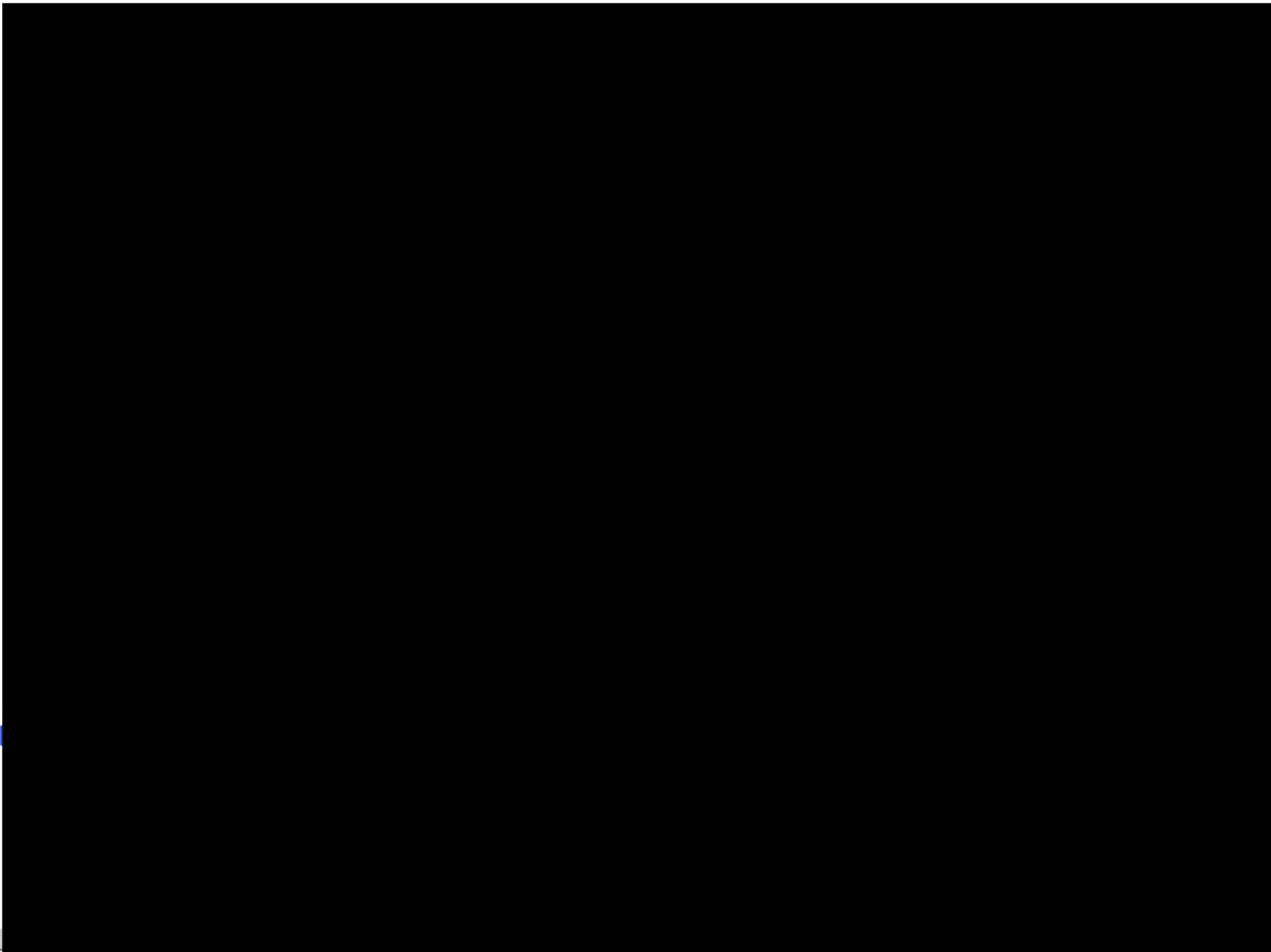
1996-1997



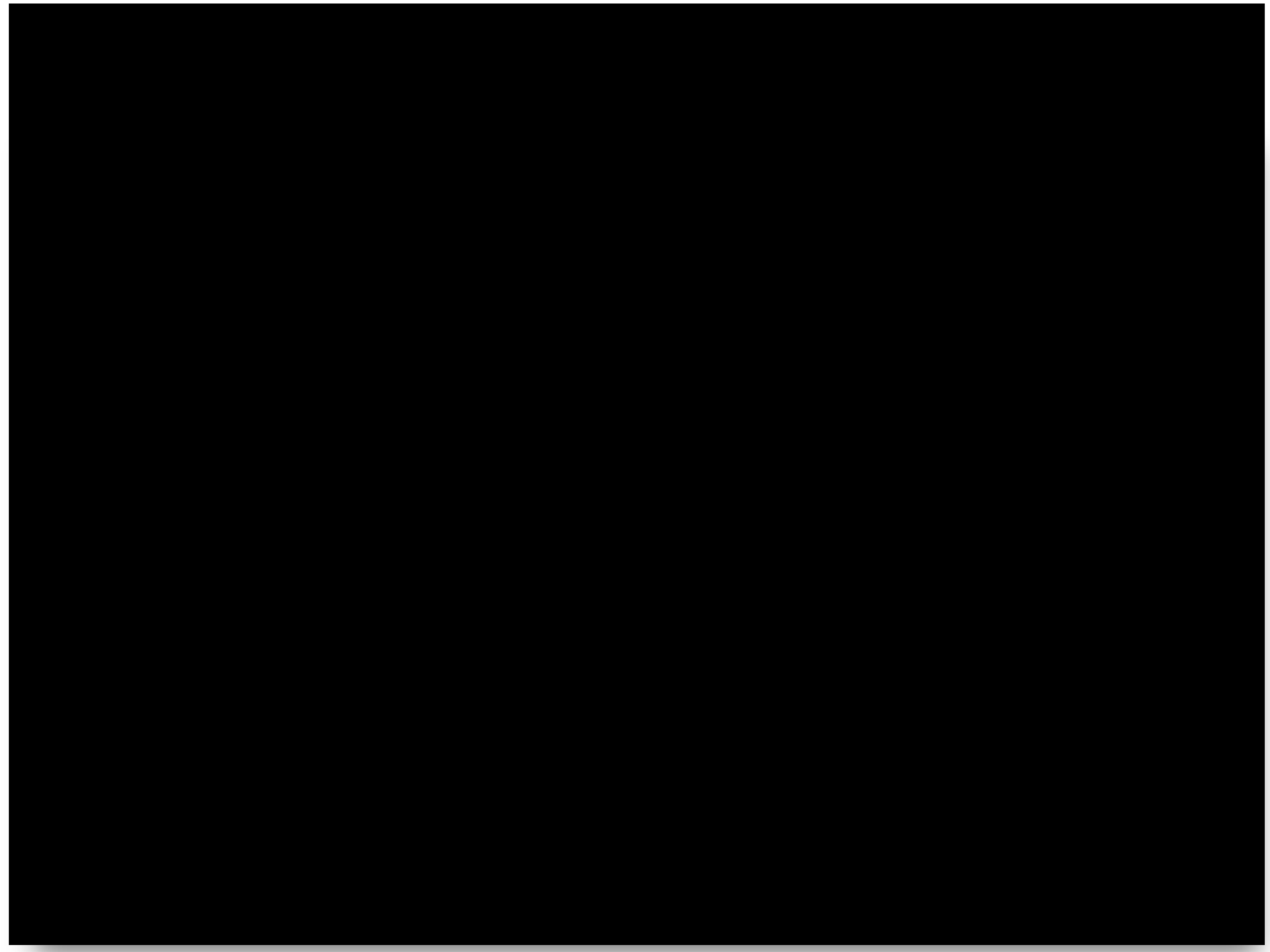








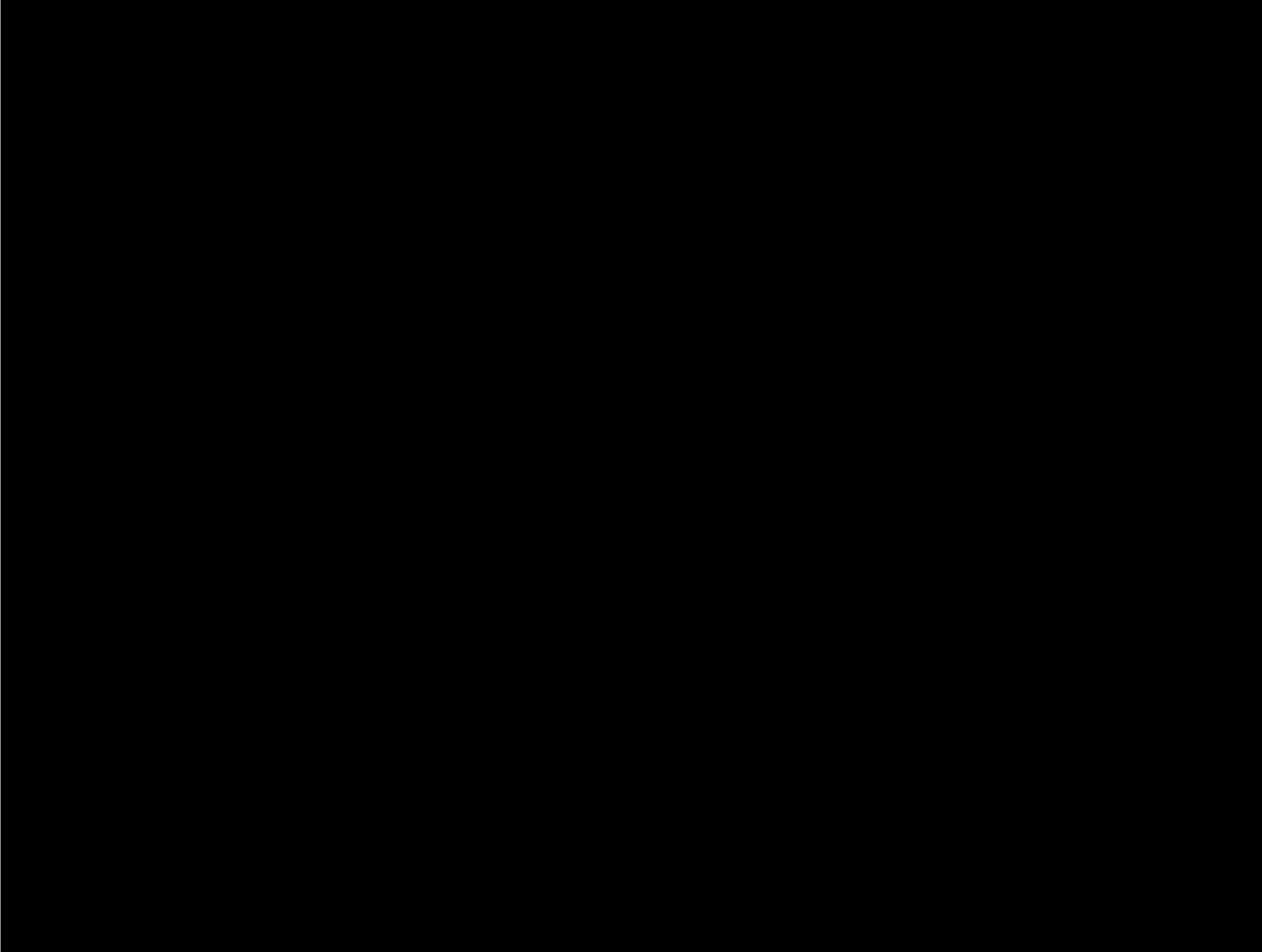














Allegheny County Department of Human Services
Predictive Analytics and Decision Support Tools
Line Item Budget Summary
Submitted by Eckerd

Personnel

Salary Expense	\$ [REDACTED]
Benefits Expense (25.3 %)	[REDACTED]
<i>Subtotal Personnel Expenses</i>	\$ [REDACTED]

Operating Expenses

Office supplies	\$ [REDACTED]
Training Materials	[REDACTED]
Travel	[REDACTED]
Telephone	[REDACTED]
Depreciation	[REDACTED]
Insurance	[REDACTED]
Professional Fees	[REDACTED]
Rent/utilities/cleaning	[REDACTED]
Copier lease	[REDACTED]
General Expenses	[REDACTED]
Administrative cost (11.0%)	[REDACTED]
Subtotal Operating Expenses	\$ [REDACTED]

Total Expenses	\$ [REDACTED]
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**PROPOSAL TO DESIGN AND IMPLEMENT DECISION SUPPORT TOOLS AND PREDICTIVE ANALYTICS IN
HUMAN SERVICES
BUDGET NARRATIVE
SUBMITTED BY ECKERD**

The budget includes estimates of the cost of providing the deliverables outlined in the project narrative to provide predictive analytics and decision support tools.

The following is an explanation to support the planned expenditures:

Salary Expense

Below is a list of staff, FTEs, and salary for each position. Salary is based on a 9 month estimated completion timeframe. The functions of these positions are outlined in the proposal. Estimated Salaries are \$138,750.

Position	FTE	Salary
Project Manager	1.0	
Research Specialist	.50	
Research Specialist	.50	
Total	2.0	

Benefits Expense

Benefits average 25.3% of salary costs per employee (\$35,094 total) and were calculated to include the following:

1. FICA: Planned at the federal rate of 7.65% of wages.
2. Unemployment: Eckerd is self-insured for unemployment at a calculated rate of 1.6% of wages.
3. Worker's Compensation: Eckerd participates in a self-insured worker's compensation plan administered through AIG. Administrative costs and estimated annual losses results in an accrued rate of 6% of wages. It is effective for claims filed 10/01/13 and thereafter.
4. Retirement: The pension plan is administered through VALIC (Variable Annuity Life Insurance Corporation). Employees are 100% vested after five years employment. Employees leaving the plan prior to five years forfeit a percentage of their accrued pension benefits. Forfeitures are offset against accrued benefits which results in an average pension rate of 3.5% of wages.
5. Health insurance: Includes health, life, disability and A,D&D insurance. Annually Eckerd's consulting insurance analyst bids out the MCO coverage. Obtaining coverage keeps our cost down in relation to a self-insured health plan. Health benefits are accrued at \$6,050 per full time employee per year.

Operating Expenses

- **Office Supplies**: *Estimated cost of \$3,200.* Includes the cost of basic office supplies to support two staff for a 9 month period. Includes general data processing, paper, pens, binders, etc. to organize and document the project plans and tools.

- **Training Materials:** *Estimated cost of \$5,600.* Includes the cost of materials to train DHS staff in the support tools for the 5 key indicators to be addressed. Estimated at \$1,120 per indicator.
- **Travel:** *Estimated cost of \$35,000.* Includes the cost of airfare, hotel, car rental and meals to support an average of 27 trips by 2 Research Specialists and the Chief of Quality to meet with DHS and work on the project over a 9 month period. Average trip cost is estimated at \$1,260. Assumes a three day stay per trip.
- **Telephone/Communications:** *Estimated cost of \$4,050.* Includes the cost of general office telephone line, cell phone for Project Manager, and air card to have connectivity to these systems.
- **Depreciation:** *Estimated cost of \$360.* This includes the cost of depreciating a laptop for the Project Manager over 9 months.
- **Liability Insurance:** *Estimated cost of \$4,500.* Liability insurance includes general liability, umbrella, professional liability, sexual abuse coverage, fidelity bond coverage, cyber security, D & O coverage, and property insurance. Eckerd purchases this coverage in aggregate for our agency as a whole. Allocations based on total payroll budgets and property values are used in establishing premiums and in pro-rating coverage to each cost center.
- **Professional fees:** *Estimated cost of \$414,000.* Cost to Mindshare to support 5 FTE's (Business Analyst, 2 Data Specialist and 2 Programmers). Business Analyst will be located in Allegheny. To deliver the 5 indicators a blended rate of \$75/hour per FTE is utilized. The cost is \$396,000. In addition, Data Center start up charge includes: Circuit procurement, Bandwidth isolation, IP addresses, Domain allocation, SSL certificates, Hardware installation of \$18,000.
- **Rent/Utilities/Office Cleaning:** *Estimated cost of \$11,250.* This includes the cost of monthly lease payments for office space and related utilities and office cleaning at \$1,250 per month to support 2 staff and a small conference room for 9 months.
- **Copier lease:** *Estimated cost of \$3,150.* This includes the cost of renting a printer/copier for 9 months at a cost of \$350 per month.
- **General Expenses:** *Estimated cost of \$2,100.* This includes the cost of computer licenses, background screening, and other miscellaneous expenses.
- **Administrative Cost:** *Estimated cost of \$72,276.* This includes the cost of corporate expenses pro-rated based on utilization of individual functions such as leadership, training, contract management, recruiting, legal fees, accounting and audit fees, payroll, information systems support, human resources, communications, and quality assurance. Average cost is 11%.

COUNTY OF ALLEGHENY

M/W/DBE PARTICIPATION STATEMENT

Failure to complete this form and submit it with your contract may cause delays in processing


SOLICITATION AND COMMITMENT

MINORITY, WOMEN AND DISADVANTAGED BUSINESS ENTERPRISES

FISCAL YEAR/PERIOD	NAME OF PROVIDER	ADDRESS	PHONE NUMBER
2014-2015	Eckerd Youth Alternatives, Inc d/b/a Eckerd	100 Starcrest Drive Clearwater, FL 33765	727-461-2990

List below ALL M/W/DBE's that were solicited – whether or not commitment was obtained – Copy this form as necessary

MBE <input type="checkbox"/> WBE <input checked="" type="checkbox"/> DBE <input type="checkbox"/> CERTIFIED BY: PAUCP website	TYPES OF SUBCONTRACT WORK OR MATERIALS	DATE SOLICITED 04/15/2014	COMMITMENT MADE <input type="checkbox"/> YES <input checked="" type="checkbox"/> NO (IF YES GIVE DATE)	GIVE REASON(S) IF NO COMMITMENT MADE
COMPANY NAME Around The Clock Cleaning Specialist	Office cleaning	SOLICITATION METHOD Email	MO DAY YR	We will solidify this contract upon the leasing of office space if awarded the contract.
ADDRESS 603 Margaret Street Pittsburgh, PA 15210			AMOUNT COMMITTED \$4440.00	
CONTACT PERSON/PHONE Kim Taylor 412-758-9624			% OF TOTAL BID 1%	
EMAIL kimtaylor44@gmail.com				
MBE <input checked="" type="checkbox"/> WBE <input checked="" type="checkbox"/> DBE <input type="checkbox"/> CERTIFIED BY: PAUCP website	TYPES OF SUBCONTRACT WORK OR MATERIALS Real Estate Broker	DATE SOLICITED 04/15/2014	COMMITMENT MADE <input type="checkbox"/> YES <input checked="" type="checkbox"/> NO (IF YES GIVE DATE)	GIVE REASON(S) IF NO COMMITMENT MADE
COMPANY NAME CSI Constrction CO., Inc.		SOLICITATION METHOD Email	MO DAY YR	
ADDRESS 8051 Aber Road Verona, PA			AMOUNT COMMITTED	
CONTACT PERSON/PHONE Heddy M. Richard			\$	
EMAIL heddycsi@verizon.net			% OF TOTAL BID	
MBE <input type="checkbox"/> WBE <input type="checkbox"/> DBE <input type="checkbox"/> CERTIFIED BY:	TYPES OF SUBCONTRACT WORK OR MATERIALS	DATE SOLICITED	COMMITMENT MADE <input type="checkbox"/> YES <input type="checkbox"/> NO (IF YES GIVE DATE)	GIVE REASON(S) IF NO COMMITMENT MADE
COMPANY NAME		SOLICITATION METHOD	MO DAY YR	
ADDRESS			AMOUNT COMMITTED	
CONTACT PERSON/PHONE			\$	
			% OF TOTAL BID	

Prepared By: MARTIN PETERS Title: DIRECTOR Date: 4-18-14 Signature: 

COUNTY OF ALLEGHENY
M/W/DBE PARTICIPATION WAIVER REQUEST

PROVIDER	Eckerd Youth Alternatives Inc.
ADDRESS	100 North Starcrest Drive
CONTACT PERSON	Martin Peters, Director of Contract Management
TELEPHONE NUMBER	(727) 461-2990
EMAIL ADDRESS	mpeters@eckerd.org
FISCAL YEAR/PERIOD	FY14/15

In all instances a good faith effort must be made to meet the M/W/DBE contract goals as outlined in Section 3.10.8.8 of the "Minority and Women Business Enterprise Utilization Affirmative Action Requirements" document.

If you plan to perform the entire contract without using M/W/DBE subcontractors and/or suppliers or have not completely met the M/W/DBE goal of 13% MBE 2% WBE, the following must be attached and submitted with this form:

- * A detailed explanation of your normal business practice
- * Operation and/or Inventory Profile
- * An active company supplier/subcontractor diversity policy
- * Explanation as to why M/W/DBE participation waiver is being requested

Note: The fully completed M/W/DBE Participation Statement must accompany this waiver request, that shows your "Good Faith Effort"

Prepared By:	Martin Peters	Title:	Director of Contract Management	Date:	April 17, 2014	Signature:	
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M/W/DBE Participation Waiver Request Documentation

Detailed Explanation of Business Practice

It is Eckerd's policy to competitively procure all services that cost over \$1,000.00. Eckerd's procurement policy is defined in Eckerd policy C2.04 (attached) which expressly states that all bids need to include Certified Minority Business Enterprises registered with the state. When Eckerd solicits services it generally will seek out qualified businesses in the geographic area. Qualified businesses are found by internet research, local contacts, and searching CMBE databases. The specifications of the service are then sent to these organizations and the bids are received. Eckerd selects the best organization to perform the work based on the cost and proposal submitted.

Active Diversity Policy


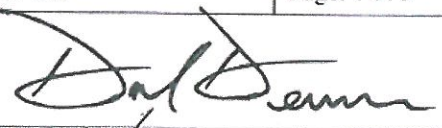
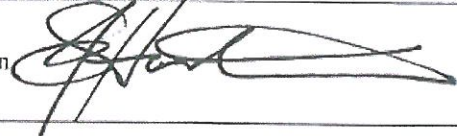
C2.04 Attached

Explanation of why the Waiver is being requested

Eckerd's response to the proposal to provide predictive analytics and decision support tools contains two subcontracted services. One is the office space rental and the other is for the services to be provided by Mindshare, our collaborative partner. The total of these two subcontracts is \$425,250. The M/W/DBE amount would be \$55,283 and the MBE amount \$8,505.

Eckerd will contract with a M/W/DBE and WBE to provide office cleaning in the amount \$4,440. We have contacted a real estate firm who did not want to lease for a partial year. We will attempt to locate another such firm to see if we can lease from a MBE prior to contract execution if we are selected. We would then meet the MBE requirement.

Eckerd is requesting the waiver as the subcontracted predictive analytics is a unique skill set that is unavailable. We have partnered with Mindshare for these specific skills sets that they have developed and own. They are not available through other vendors. As mentioned in the detailed explanation of business practice and as evidenced by the attached policy, Eckerd has a long standing history of utilizing a wide array of vendors specifically those registered as CMBE and WBE. All reasonable efforts will be made to comply with the requirements of the RFP.

COMPETITIVE BIDDING		
	Effective Date: 03/24/11	Chapter: C. Finance
	Supersedes: 08/21/09	Applicable to: All
	Policy: C2.04	
	Page: 1 of 3	
Chief Executive Officer: David Dennis 		
Chief Financial Officer: Len Hartman 		

I. POLICY

It is the policy of ECKERD to solicit bids for merchandise or services with a projected dollar value of \$1,000.00 or over. This policy pertains to non-capital purchases. See [Capitalization \(Policy C1.06\)](#) for capital purchases.

II. DEFINITIONS

None.

III. PROCEDURES/GUIDELINES

A. General Purchases (not related to Federal grants)

1. The Facility Director or, in Clearwater, the Department Head is responsible for obtaining at least 2 written bids for purchases over \$1,000. These bids are to be attached to the purchase order or invoice attachment. (Also see [Policy C2.01](#) regarding Approval Limits). Exceptions to this requirement are as follows:
 - a. Routine, Recurring Purchases – Such as regular weekly food orders and utilities.
 - b. Contracted Services – Services for which a signed, approved contract exists.
 - c. Special Circumstances – Such as emergency purchases or when only one supplier exists for the item to be purchased. A full explanation of any such circumstances must be attached to the purchase order.
 - d. The purchase has been approved by Controller, Chief Financial Officer, or Chief Executive Officer.
2. Bids are to be solicited from vendors who can qualify to meet all the requirements under State and federal guidelines. This needs to include vendors listed in the Certified Minority Business Enterprise to be compliant with State contracts.

ECKERD POLICY C2.04
COMPETITIVE BIDDING

Page 2 of 3

3. The vendor source should be obtained from the Thomas Register, CMBE Directory, telephone books, catalog library, experience, Internet, and computerized vendor list. In Florida, facilities under contract with the Department of Juvenile Justice (DJJ) must, in accordance with Section 946.515(2) and (4), F.S., obtain quotes and purchase articles from PRIDE and CMBE vendors when possible.
4. When required by contract, programs shall comply with Florida State Statute 413.06. This statute requires that programs utilize non profit agencies for the blind or severely handicapped when purchasing items necessary to carry out the contract, so long as the product is able to be delivered in a reasonable time.

B. Purchases made under Federal grants

In addition to the procedures above, the following guidelines must also be followed when purchasing goods or services under federally funded grants as stated in the signed contract:

1. Utilize minority and small business where practical.
2. All purchases and/or contracts for services and goods in excess of \$10,000 must document in writing the following:
 - a. The basis for contractor selection.
 - b. The justification for lack of competition if bids were not obtained.
 - c. The basis for the award or price.
 - d. A clause containing conditions which allow for administrative, contractual, or legal remedies in instances in which contractors violate or breach contract terms.
 - e. A clause containing provisions for termination by ECKERD which include the manner by which termination will be effected and the basis for settlement.
 - f. A clause containing provisions regarding the contractor's compliance with federal Equal Employment Opportunity guidelines as supplemented by the Department of Labor, and all Civil Rights Requirements.

ECKERD POLICY C2.04
COMPETITIVE BIDDING

Page 3 of 3

3. Construction contracts in excess of \$2,000 must contain the following provisions:
 - a. A clause stating compliance with the Copeland AntiKick Back Act prohibiting contractors from inducing employees or subcontractors to give up any portion of their compensation.
 - b. A clause stating compliance with the Davis Bacon Act.
 - c. A clause stating compliance with the Contract Work Hours and Safety Standards Act.
4. All purchases and/or contracts for services and/or goods in excess of \$100,000 must document in writing the following:
 - a. A contractor is bonded or carries insurance to cover default on his part.
 - b. A clause providing for compliance with the Clean Air Act of 1970 and the Federal Water Pollution Control Act.
5. All contracts with the principal purpose of creating, developing, or improving a process or method must document the following:
 - a. A clause providing that matters related to the rights to materials generated under the contract are subject to federal regulation.
 - b. For any contract over \$10,000, a clause allowing ECKERD access to the contractor's books and records related to the contract for purposes of auditing.

IV. ATTACHMENTS/FORMS

None.

V. REFERENCES

[Capitalization \(Policy C1.06\)](#)

[Approval Limits \(Policy C2.01\)](#)

VI. ACCOUNTABILITY

The Finance and Administration Division has accountability for policy administration and compliance. Any recommended changes to the policy must be submitted to the Senior Vice President of Finance and Administration for consideration.